

Introduction

This guide was created as a supplement for ServicePoint trainings. Users must enter data in the exact order specified below. This resource does not include every navigational mouse click.

Tech Support

Contact Baltimore County's HMIS Administrator, Jason Burns, for HMIS tech support, trainings, custom reports, assessments, etc. Emails are the preferred method of contact, and will produce much faster responses than voicemails. If your HMIS tech support phone call is not answered, Do NOT leave a voicemail. Submit an email, instead.

Email: jburns@baltimorecountymd.gov

Phone: 443-208-1020

HMIS Resources Web Address

Baltimore County's HMIS website contains current HMIS information, forms, guides, and data scores.

<http://www.baltimorecountymd.gov/hmis>

SP5 Login (Live Site) https://sp5.servicept.com/baltimoreco	SP5 Login (Training Site) https://sp5.servicept.com/baltimoreco_demo
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MANDATORY DATA ENTRY ORDER:

1. SEARCH	SAME DATE	For those of you entering data for more than one provider, be sure you use the "Enter Data As" the correct provider.
2. ASSESSMENT	SAME DATE	If not entering data on the same day that you saw your client, you must "Back Date" before you complete your client's assessment.
3. HOUSEHOLD	SAME DATE	If your client is single & w/o children, skip this step, as SP5 will label your client as "Single." Do NOT create a "Single Household."
4. ROI	SAME DATE	Release of Information (ROI) = Consent Form. This step must be completed for every program, and is only valid for one year.
5. CHECK-IN	SAME DATE	Check your client into a bed. Be sure to check-in family members, if applicable.
6. CHECK-OUT		Update client assessment , and then check-out your client(s). Be sure to accurately complete the Reason for Leaving and Destination .

1. SEARCH - Search for your client in ClientPoint to verify if your client is already in our database. Search by First and Last Name only. If no matches are found, complete the First Name, Last Name, SS#, and SS# Data Quality to create a new client.

Client Search

Please Search the System before adding a New Client.

Items in *Italics* are for Data Entry ONLY and will not be used for Search Results.

	First	Middle	Last	Suffix
Name				
Alias				
Social Security Number				
Social Security Number Data Quality				
Exact Match				
Search ACTIVE Clients				
Search INACTIVE / DELETED Clients				
Search ALL Clients				
			Date of Birth	
			DOB Data Quality	
			Gender	
			Primary Race	
			Secondary Race	
			Ethnicity	

Search

Clear

Add New Client With This Information





NOTES

ENTER DATA AS: For those of you entering data for more than one provider, be sure you are in the correct provider by clicking on “Enter Data As.”

NICKNAMES & ALIASES: For clients that have nicknames/aliases or may be shortened/ extended, search **ALL** possibilities. For example, if your client’s name is “Jim Smith,” search for “Jim Smith,” “Jimmy Smith,” “James Smith,” etc.

UNIQUE NAMES: For clients that have a unique first and/or last name, search by only the first (or few) letter of the unique name. For example, if your client’s name is “Jason Woohyunsung”, search for “Jason W,” “Jason Woo,” etc.

2. ASSESSMENT (**Back Date** First, if entering on later date) - Once you are in Client Profile, accurately complete or update the assessment. If your client's assessment is already completed, you must verify and update! All of the questions in **BOLD RED** are required.

Client Information		Service Transactions													
Summary	Client Profile	Households	ROI												
Entry / Exit	Case Managers	Case Plans	SSOM												
Activities	Assessments														
<p> Client Record Issue ID Card</p> <table border="1"> <tr> <td>Name</td> <td>Jetson, Jane</td> </tr> <tr> <td>Alias</td> <td>Momma Jetson</td> </tr> <tr> <td>Social Security</td> <td>111-11-1111</td> </tr> <tr> <td>SSN Data Quality</td> <td>Full SSN Reported (HUD)</td> </tr> <tr> <td>Age</td> <td>70</td> </tr> </table>		Name	Jetson, Jane	Alias	Momma Jetson	Social Security	111-11-1111	SSN Data Quality	Full SSN Reported (HUD)	Age	70	 <p>Change Clear</p>			
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Age	70														
<p> Client Demographics </p> <table border="1"> <tr> <td>Date of Birth</td> <td>04/03/1942</td> </tr> <tr> <td>Date of Birth Type</td> <td>Full DOB Reported (HUD)</td> </tr> <tr> <td>Gender</td> <td>Male</td> </tr> <tr> <td>Primary Race</td> <td>White (HUD)</td> </tr> <tr> <td>Secondary Race</td> <td></td> </tr> <tr> <td>Ethnicity</td> <td>Hispanic/Latino (HUD)</td> </tr> </table>		Date of Birth	04/03/1942	Date of Birth Type	Full DOB Reported (HUD)	Gender	Male	Primary Race	White (HUD)	Secondary Race		Ethnicity	Hispanic/Latino (HUD)		
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NOTES

BACK DATE: If you are not entering data on the same day that your client entered your program, go into "**Back Date**" mode before completing the assessment.

When using the date fields, do **NOT** change the time. Time fields are **NOT** relevant to reporting standards, and you may jeopardize data integrity. This applies to all date and time fields in SP5.

If you enter data for your client in "real time," or even eight hours later on the same day, you do **NOT** use "**Back Date**" mode. As long as you enter your data on the same day, "**Back Date**" mode is not needed. Remember, the time fields are **NOT** relevant.

PROGRAM PERFORMANCE: This is the 1st "snapshot" of your client. Most reports use this data, as well as the "snapshot" at Exit to determine your program performance and client progress. It's vital to ensure all data is accurate at both snapshots. Keys to accurate data include updating assessments at both Entry & Exit, as well as eliminating "Don't Know" or "Refused" responses. Sub assessments for Monthly Income, Non-Cash Benefits, and Disabilities must match yes/no questions.

REQUIRED QUESTIONS: All **BOLD RED** questions are required, including "pregnancy", "military", etc. SP5 will not allow you to continue to the next step if all required questions are not completed. If questions that are *not* in **BOLD RED** are relevant to your client, these questions must also be answered. For example, if your client is homeless, all of the homeless questions must be completed.

3. HOUSEHOLD INFORMATION – Create or modify in the Households tab, if applicable. **DO NOT COMPLETE THIS SECTION IF YOUR CLIENT IS SINGLE & WITHOUT CHILDREN!!!** SP5 automatically assumes your client is single if Households is not completed.

Household Type	
Household Type *	<div>-Select-</div>
Client Search	<div>-Select-</div> <div>Cohabitation</div> <div>Couple With No Children</div> <div>Female Single Parent</div> <div>Foster Parent(s)</div> <div>Grandparent(s) and Children</div> <div>Male Single Parent</div> <div>Non-custodial Caregiver(s)</div> <div>Other</div> <div>Single</div> <div>Two Parent Family</div>

NOTES

SINGLE CLIENTS (w/o Children): Do not create a “Single” household for single clients that do not have children.

ADDITIONAL HOUSEHOLD MEMBERS: It is now mandatory to collect required data for every household member that benefits from your service(s). Once you create/modify a household, you must complete/update the assessments for all household members before moving on to the next step.

MULTIPLE HOUSEHOLDS: Multiple households are becoming more common. SP5 has special features to create and modify multiple households.

For those clients where multiple households were accidentally created, please delete the incorrect household or contact your HMIS Admin, as false multiple households will jeopardize your data integrity.

Release of Information	
Release of Information - (21319) Jetson, Jane	
Household Members	
<p>Note: To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.</p>	
<input type="checkbox"/>	(22662) Female Single Parent
<input type="checkbox"/>	(21319) Jetson, Jane
<input type="checkbox"/>	(29677) Jetson, Elroy
Release of Information Data	
Provider *	Baltimore County Department of Planning (1)
Release Granted *	Yes
Start Date *	05 / 20 / 2012
End Date *	05 / 20 / 2013
Documentation	Signed Statement from Client
Witness	
<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>	
<input type="button" value="Save Release of Information"/> <input type="button" value="Cancel"/>	

MULTIPLE ROI's: Each program must have its' own consent form (county rule).

EXPIRATION: All consent forms are only valid for one year (county rule).

5. CHECK-IN - Check your client into a bed. Be sure to check-in family members, if applicable.

Unit Entry Data - (21319) Jetson, Jane

Date In *
05 / 22 / 2012
5 : 27 AM
Midnight Check In


Unit Name / Number
1st Floor Main Room / Bed 001
Assign Unit

Supplies Given

Locker number

Codes/Notes

Incidents For (21319) Jetson, Jane

	Ban Start	Ban End	Incident	Ban Code	Provider	Site	Staff
	01/01/2009	05/22/2012	Violent Behavior		CAN Shelter: East Side	CAN: East Side	Jason Burns

Add New Incident
Showing 1-1 of 1

Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(22662) Female Single Parent

☒ (21319) Jetson, Jane
Assign Unit

☐ (29677) Jetson, Elroy
Assign Unit

NOTES

ENTRY TYPE: By default, the Entry type is selected to "HUD." Do not change this, or your client data will not reflect on reports.

SERVICE TRANSACTIONS: Additional service transactions may be recorded at Check-In.

Check Out List						
Check Out	Client ID	Client Name	Group ID	Unit	Date Out / Reason For Leaving / Destination	Supplies Returned
<input type="checkbox"/>	21319	Jetson, Jane		Bed 001	05 / 22 / 2012 6 : 14 AM Completed program Rental by client, no housing subsidy (HUD)	<input type="checkbox"/>
						<input type="button" value="Check All"/> <input type="button" value="Uncheck All"/>

Current Check Out Date: 05 / 22 / 2012 6 : 14 AM

Future Check Out Date: 05 / 22 / 2012 6 : 14 AM

PROGRAM PERFORMANCE: This is the 2nd “snapshot” of your client. Be sure to accurately update your client’s assessment on this Exit screen. Try to eliminate “Don’t Know” or “Refused” responses. Sub assessments for Monthly Income, Non-Cash Benefits, and Disabilities must match yes/no questions! These client snapshots will be used to measure your program’s performance. Most grantors/funders award the most points and/or funds to those programs where consistent client progress is evident.

DESTINATION: Homeless programs need to accurately record client destination upon program Exit. Most grantors/funders award the most points and/or funds to those programs where the highest percentage of clients Exit to a “Permanent Destination.”